



28 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,974	(0.5) %	8.0 %
BSE SENSEX	32,383	0.0 %	7.6 %
CNX BANK	24,747	(0.7) %	14.8 %
CNX MIDCAP	18,322	(0.3) %	5.7 %
CNX SMALLCAP	7,702	(0.7) %	8.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,797	0.4 %	9.6 %
S&P 500	2,475	(0.1) %	9.6 %
FTSE 100	7,443	(0.1) %	3.7 %
HANG SENG	27,131	0.7 %	22.5 %
NIKKEI	20,080	0.2 %	2.5 %
SHANGHAI COMPOSITE	3,250	0.1 %	3.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.11	(0.4) %	(4.9) %
EUR/USD	1.17	0.3 %	10.2 %
GBP/USD	1.31	0.4 %	6.4 %
USD/JPY	111.11	(0.7) %	(4.2) %
USD/AUD	1.26	(0.8) %	(8.3) %
USD/SGD	1.36	(0.3) %	(5.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	1.8 %	(6.8) %
Gold(INR/10g)	28,327	0.0 %	1.9 %
Gold Comex(USD/oz)	1,270	1.3 %	9.7 %
SILVER(INR/1Kg)	37,737	0.0 %	(3.0) %
Aluminium(USD/MT)	1,912	0.8 %	12.3 %
Copper(USD/MT)	6,238	1.4 %	11.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	(0.1) %	(0.2) %

Global Economy: Reflecting a sharp jump in orders for transportation equipment, the Commerce Department released a report on Thursday showing a substantial increase in new orders for US manufactured durable goods in the month of June. The Commerce Department said durable goods orders spiked by 6.5%. First-time claims for US unemployment benefits rose by more than expected in the week ended July 22nd, according to a report released by the Labor Department on Thursday. The report said initial jobless claims climbed to 244,000, an increase of 10,000 from the previous week's revised level of 234,000. German consumer confidence is set to strengthen in August, survey data from the market research group GfK showed Thursday. The forward-looking consumer sentiment index rose to 10.8 in August from 10.6 in July.

Global Equities: US stocks ended mixed over the course of the trading session on Thursday. While the Nasdaq and the S&P 500 pulled back into negative territory, the Dow reached a new record closing high.

Indian Economy: Though imposition of Minimum Alternative Tax (MAT) in 2011 slowed down growth of special economic zones (SEZs), but implementation of Goods and Service Tax (GST) provides wonderful opportunity for making investments in Indian SEZs, a top Commerce Ministry official said at an ASSOCHAM event. After 2011, today again probably is the right moment to make investments in the SEZs, as it is the only scheme of the many export promotion schemes operating in India, wherein an initio exemption has been provided from customs duty as well as IGST (Integrated Goods and Service Tax), stated L.B. Singhal, development commissioner, Noida SEZ. He also said that this exemption has been provided both for import as well as domestic procurement of the raw materials, capital goods and others.

Equity Markets: Key benchmark indices settled near the flat line in a volatile session. Both the Sensex, and the Nifty, had hit record high in mid-morning trade. The key indices had opened the session higher and traded with modest gains till afternoon trade, tracking firmness in global markets. Later, they trimmed intraday gains and hovered with small gains till mid-afternoon trade. Key indices erased all the intraday gains towards the late trade to settle near the flat line. A bout of volatility was witnessed as traders rolled over positions in the futures & options (F&O) segment from July 2017 series to August 2017 series.

Corporate News: ITC's net profit rose 7.37% to Rs 2560.50 crore on 4.41% growth in total income to Rs 14277.19 crore in Q1 June 2017 over Q1 June 2016. ICICI Bank's net profit fell 8.21% to Rs 2049 crore on 0.52% growth in total income to Rs 16847.04 crore in Q1 June 2017 over Q1 June 2016. The result was announced after market hours yesterday, 27 July 2017. ONGC's net profit fell 8.22% to Rs 3884.73 crore on 6.36% increase in total income to Rs 19927.93 crore in Q1 June 2017 over Q1 June 2016. The result was announced after market hours yesterday, 27 July 2017. Idea Cellular reported consolidated net loss of Rs 814.90 crore in Q1 June 2017 compared with net profit of Rs 220.40 crore in Q1 June 2016. Total income fell 14.34% to Rs 8181.70 crore in Q1 June 2017 over Q1 June 2016. Dr Reddy's Laboratories and CHD Bioscience Inc., a privately-held biopharmaceutical company, announced a global licensing agreement for the clinical development and commercialization of Dr. Reddy's phase III clinical trial candidate, DFA-02.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(29.9)	11.1	25.4
MF(INR cr)	1,104.7	461.0	481.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,087	32,857	30,278
F&O(INR cr)	1,454,084	604,117	553,145

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	10.3	11.2
NSE VIX	11.2	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,922	1.0 %	15.7 %	Energy	12,664	(1.0) %	7.1 %
IT	10,612	(1.6) %	0.2 %	Pharma	9,880	(1.6) %	(5.9) %
Metals	3,250	(1.0) %	4.7 %	Finance	10,164	1.8 %	15.2 %
Auto	10,919	(0.8) %	10.1 %	PSU	3,568	(0.1) %	1.2 %
FMCG	25,970	(0.5) %	9.9 %	Real Estate	282	(0.2) %	28.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HD F C	1,728	5.8 %	12.7 %	Cummins In	960	(4.0) %	(0.2) %
Godrej Con	1,074	4.4 %	26.7 %	Hind.Zinc	275	(3.4) %	(5.6) %
Yes Bank	1,786	4.3 %	16.1 %	Dr Reddy's	2,620	(3.2) %	(4.5) %
HDFC Bank	1,790	2.4 %	24.9 %	Tech Mahin	377	(3.1) %	(16.7) %
Dabur Indi	312	1.8 %	11.3 %	Tata Motor	262	(3.0) %	(6.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (2Q)	28-07-2017	1:30	AUD	-	0.005
Producer Price Index (YoY) (2Q)	28-07-2017	1:30	AUD	-	0.013
Gross Domestic Product (MoM) (May)	28-07-2017	12:30	CAD	-	0.002
Gross Domestic Product (YoY) (May)	28-07-2017	12:30	CAD	-	0.033
KOF Leading Indicator (Jul)	28-07-2017	7:00	CHF	-	105.5
Euro-Zone Business Climate Indicator (Jul)	28-07-2017	9:00	EUR	-	1.15
Euro-Zone Consumer Confidence (Jul F)	28-07-2017	9:00	EUR	-	(1.7)
Euro-Zone Economic Confidence (Jul)	28-07-2017	9:00	EUR	-	111.1
Euro-Zone Industrial Confidence (Jul)	28-07-2017	9:00	EUR	-	4.5
Euro-Zone Services Confidence (Jul)	28-07-2017	9:00	EUR	-	13.4
French Gross Domestic Product (QoQ) (2Q A)	28-07-2017	5:30	EUR	-	0.005
French Gross Domestic Product (YoY) (2Q A)	28-07-2017	5:30	EUR	-	0.011
German Consumer Price Index (MoM) (Jul P)	28-07-2017	12:00	EUR	-	0.002
German Consumer Price Index (YoY) (Jul P)	28-07-2017	12:00	EUR	-	0.016
Baker Hughes U.S. Rig Count (Jul 28)	28-07-2017	17:00	USD	-	950
Core Personal Consumption Expenditure (QoQ) (2Q A)	28-07-2017	12:30	USD	-	0.02
Employment Cost Index (2Q)	28-07-2017	12:30	USD	-	0.008
Fed's Kashkari Speaks at Townhall Event	28-07-2017	17:20	USD	-	-
Gross Domestic Product (Annualized) (2Q A)	28-07-2017	12:30	USD	-	0.014
Gross Domestic Product Price Index (2Q A)	28-07-2017	12:30	USD	-	0.019
Personal Consumption (2Q A)	28-07-2017	12:30	USD	-	0.011
Revisions: GDP data from 2014-16; reference year remains 2009	28-07-2017	12:30	USD	-	-
U. of Mich. 1 Yr Inflation (Jul F)	28-07-2017	14:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (Jul F)	28-07-2017	14:00	USD	-	0.026
U. of Mich. Current Conditions (Jul F)	28-07-2017	14:00	USD	-	113.2
U. of Mich. Expectations (Jul F)	28-07-2017	14:00	USD	-	80.2
U. of Michigan Confidence (Jul F)	28-07-2017	14:00	USD	-	93.1

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